



Salomon Smith Barney & Citibank

CIB Technology 2001 Year-End Performance Plan/Summary

Name (Last, First, MI) Millan, Carmelo	Job Title Intermediate Telecom Analyst	Social Security #
Organizational Name/Project Team: Network Integration Services / Infrastructure Group		Review Period From: 1/1/01 To: 12/31/01
Reviewer Name/Job Title Richard J. Braunagel / Assistant Vice President		

Section 1 – Key job responsibilities:**REDACTED**

1.	Facilitate and maintain all day-to-day network requests to include MAC's, CSR's, GPMS trouble tickets, and LOIS server requests.
2.	Network Engineering/Integration deliverables to include all network related projects.
3.	Provide neat and accurate cabling documentation.
4.	

Section 2 – Assessment of job-related factors:

	Does not meet expectations	Occasionally meets expectations	Consistently meets expectations	Usually exceeds expectations	Consistently exceeds expectations
Job proficiency/knowledge	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting comments	Carmelo has a great understanding of Networking. He has successfully completed his CCNA and is currently attending classes to achieve his CCNP. I would like to see him deal more with the project at hand.				
Quality of work	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting comments	Carmelo can be more thorough with his installations to include cable neatness, labeling, and documentation.				
Productivity/efficiency	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting comments	Carmelo utilizes his time productively when working on particular projects.				
SDLC compliance/testing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting comments	Not applicable				
Teamwork/interpersonal skills	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting comments	Would like to see Carmelo work more effectively with all people across different levels associated with a particular task.				
Service	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting comments	Carmelo should provide more follow through with his tasks.				
Initiative	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting comments	Carmelo needs to be told what to do on a constant basis. I would like to see him become more proactive in his assignments.				
Communication	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supporting comments	Carmelo should learn to communicate better with his peers and people across different levels. He should become more respectful of peoples' ideas and opinions.				

Section 3 – Assessment of Managerial Factors:

	Does not meet expectations	Occasionally meets expectations	Consistently meets expectations	Usually exceeds expectations	Consistently exceeds expectations
FINANCIALS					
Job Actual vs. Forecast	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost Per FTE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Recruiting (Cost per hire)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Expense Management Initiative	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PEOPLE					
Turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Internal Mobility	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff Development/Training	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff Morale	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
PROJECT DELIVERY					
Completion on Time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Completion on Budget	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Impact (Revenue/Cost Returns)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CUSTOMER SATISFACTION					
Survey Results	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CONTROLS					
Major Business Issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Business Issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Project Issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
WELLNESS/OUTAGES					
Production Support Costs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production Problems	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Production Assessment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OVERALL PERFORMANCE ASSESSMENT 1/1/01 TO 12/31/01

	Does not meet expectations	Occasionally meets expectations	Consistently meets expectations	Usually exceeds expectations	Consistently exceeds expectations
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OVERALL PERFORMANCE SUMMARY FOR 1/1/01 TO 12/31/01:

Carmelo has successfully completed his CCNA class approximately 5 months ago and is currently attending classes to achieve his CCNP. I believe that his being a part of the Infrastructure group is not utilizing his experience to the utmost of his abilities. I believe that Carmelo may not feel challenged by the work within the Infrastructure group and I find that relocating him into another group whether it be Integration or Systems Admin may be a little more beneficial to his needs.

PRIMARY AREAS FOR IMPROVEMENT/SKILL ENHANCEMENT:

I believe that Carmelo should spend more of his time with the problem at hand. I believe that when faced with a problem, the solution may be right in sight but he spends too much time analyzing the issue.

I believe that Carmelo should put more effort into his communication skills and learn to deal with people across different levels.

APPRAISEE'S COMMENTS:

Employee Signature and Date: _____

(Signature acknowledges that a discussion of this document has taken place, but does not indicate that I necessarily agree with this appraisal of my performances.)

Manager Signature and Date: _____

Next Level Management and Date: _____

Ratings guide:**1. Consistently exceeds expectations**

- Performance always exceeds required level of proficiency; tasks were consistently completed with a high level of quality that was clearly visible and recognized by others.
- Performance expectations were met with little direction from management; appraisee took on and completed work that was beyond the normal scope of the job responsibilities and demonstrated high levels of participation, initiative, and success.

2. Usually exceeds expectations

- Performance usually exceeded required level of proficiency.
- Performance expectations were met with less direction from management than anticipated; appraisee initiated ideas and methods that improved the work area or changed the position.

3. Consistently meets expectations

- Performance consistently met required level of proficiency.
- Performance expectations were met at a normal pace with average direction from management.

4. Occasionally meets expectations

- Performance sometimes met required level of proficiency; improvement needed.
- Completion of responsibilities required more than acceptable time and attention by manager.

5. Does not meet expectations

- Performance consistently did not meet required level of proficiency and expected performance; immediate improvement is necessary.
- Completion of responsibilities required excessive time and attention by manager.

Description of job factors:

Job proficiency/Knowledge: Technical knowledge and ability is commensurate with job title and level of experience. Applies technical skills to the job. Understands technical environment and businesses supported.

Quality of work: Work is thorough, accurate, and complete. Develops appropriate test plans and executes them successfully. Adheres to standards, high level of client satisfaction.

Productivity/efficiency: Produces required amount of work within planned timeframes.... meets deadlines. Uses corporate resources effectively. Utilizes appropriate tools. Leverages existing assets.

Teamwork/interpersonal skills: Successfully works with others to achieve goals. Shares information. Maintains positive working relationships. Lends support and assistance readily.

Service: Responsive to client needs and those of others in the firm. Involves other in improving processes. Participates as a partner.

Initiative: Takes action beyond requirements. Anticipated and addresses issues directly. Resourceful. Self-starting.

SDLC: Understands and adheres to SDLC policy and good practices.

Communication: Expresses thoughts logically, clearly, and concisely. Listens well and respond appropriately.